



CalHEERS Agency Portal Quick Guide

Agency of One (Sole Proprietor) or More

Overview

An Agent who is designated as an Agency Manager for an Agency will act in an administrative and operational role for that Agency. The Agency Manager must be a certified and licensed insurance Agent. The Agency Portal combines all of the Agency's Agent's Books of Business into one manageable Agency Book of Business displayed in the portal, and in a downloadable report.

What you need to know

Agency Managers will log into their CalHEERS account and see an Agency Portal landing page, shown below.



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Refine Results By

Reset All

First Name

Last Name

Agent Status

☐ Active ☐ Inactive

Certification Status

Select Certification Status ▾

License Number

GO

| Agent Name | Active/Inactive | Consumers | Agent License # | Certification Status | Actions |
|-----------------|-----------------|-----------|-----------------|----------------------|---------|
| John Faletese | Active | 0 | 4444444 | Pending | ⚙️ ▾ |
| Miss Jones | Active | 19 | 1541541 | Certified | ⚙️ ▾ |
| Monster Energy | Active | 0 | 0258147 | Certified | ⚙️ ▾ |
| Red Bull | Active | 2 | 0062912 | Certified | ⚙️ ▾ |
| Rock Star | Active | 0 | 0789456 | Certified | ⚙️ ▾ |
| Rock Star | Active | 0 | 0789456 | Pending | ⚙️ ▾ |
| Rosa Keophimane | Active | 0 | 8888888 | Pending | ⚙️ ▾ |
| Star Bux | Active | 0 | 1597891 | Certified | ⚙️ ▾ |

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How to Access your Agent Dashboard

Agency Managers can enroll consumers. Agency Managers can click on the “My Delegations” tab in the header, shown below. This is where an Agency Manager **can access their own Agent dashboard to write new business**. Agency Managers can also make changes to their Agent profile by clicking on the “My Agent Profile” link.



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Refine Results By

Reset All

First Name

Last Name

Agent Name

John Faletese

Agent Name

Miss Jones

Agent Name

Monster Energy

Pending delegation requests

Active Consumers

Inactive Consumers

My Dashboard

| Consumers | Agent License # | Certification Status | Actions |
|-----------|-----------------|----------------------|---------|
| 0 | 4444444 | Pending | ⚙️ ▾ |
| 19 | 1541541 | Certified | ⚙️ ▾ |
| 0 | 0258147 | Certified | ⚙️ ▾ |



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Navigate back to the Agency Portal Homepage

To return to the Agency Portal homepage, click on the Covered California logo on the top left corner of the page.



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Agency Managers can add new Agents to their roster

An Agency Manager is required to create the new Agent profile in the Agency Portal. This begins the certification process for the Individual Agent with Covered California. **If an Agent is already certified with Covered California, we will review their certification status and update their status to “Certified” for the Agency.** Review our [Add a New Agent to an Agency Job Aid](#) for step-by-step instructions.

REMINDER: The Agency Manager username and password should only be used by the authorized Agency Manager. Agency Portal accounts contain secure business information that should not be accessed by anyone other than the authorized user. Individual Agents can refer to our [CalHEERS Password Reset Job Aid](#) for step-by-step instructions on resetting their CalHEERS password.